INTERNATIONAL STUDENT RECRUITMENT

ENGAGING THE INTERNATIONAL STUDENT MARKETPLACE AS WE LOOK TOWARDS A NEW NORMAL

MAY 2021
FOREWORD

As the world continues to come to terms with the seismic waves of change brought about by the COVID-19 pandemic, the higher education sector finds itself emerging from the pandemic facing opportunities ahead. As ever, student recruitment remains a crucial aspect of the sectoral landscape, and the cohort of students that will enter international higher education in the coming years will have unique needs, desires and circumstances to those who came before them.

This is why, at THE Student, we have asked the Times Higher Education Consultancy to produce a student recruitment policy briefing based on primary research with prospective students. I am delighted to present this report, which we are sure will help universities around the world to take these cautious first steps into a world that we are beginning to dare to consider a possibility: a ‘post-Covid’ world and the settling of the much discussed ‘new normal’, whatever that may be.

This briefing presents findings about three hot topics in the industry: student views about making study choices during the pandemic (including their views about online learning), student views about education agents and, finally, consideration of the way that they make study choices.

The findings are driven by a new resource that we have developed at THE: THE Student Pulse, a global panel of prospective students. I am very excited to see such incredible insights being generated by the panel and look forward to seeing further examples of THE Student Pulse providing insight on the hot topics of the day. As ever it is invigorating to hear the student voice about matters that are much discussed but often lack this crucial element.

A key issue we have identified through listening to the voices of thousands of prospective international students is that many feel unable to make informed choices about which agents and service providers to trust when making one of the biggest decisions of their lives. This is an issue close to our hearts at THE Student, and one we will seek to help address in the months ahead.

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RESPONSE TO THE SURVEY BY ‘HOME COUNTRY’ AND INTENDED STUDY DESTINATION

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<tr>
<th>CONTINENT</th>
<th>STUDENT ‘HOME CONTINENT’</th>
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<tr>
<td>Asia</td>
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<td>Oceania</td>
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Base: 3,039 prospective students
Around 3 in 10 students agreed that it would be preferable to study online at an international institution than face-to-face at an institution in their home country (28%).

JUST FOUR IN TEN STUDENTS AGREED THAT ONLINE LEARNING WITH AN INTERNATIONAL UNIVERSITY WOULD BE A WORTHWHILE EXPERIENCE (42%).

FINANCIAL DIFFICULTIES DUE TO THE PANDEMIC WERE IN THE TOP THREE CONCERNS FOR AROUND HALF OF ALL PROSPECTIVE INTERNATIONAL STUDENTS (48%).

Six in ten students have had their study plans disrupted (61%), with four in ten having delayed their plans (39%).

AROUND HALF OF PROSPECTIVE STUDENTS HAVE FOUND IT DIFFICULT TO FIND INFORMATION ABOUT UNIVERSITIES AND COURSES (49%).

85% of prospective students did not know much about agents or would not be able to find out those that had a good reputation.

64% OF PROSPECTIVE STUDENTS HAD HEARD OF EDUCATION AGENTS BUT JUST 13% HAD A GOOD LEVEL OF KNOWLEDGE ABOUT THEM.

STUDENTS WERE GENERALLY POSITIVE (45%) OR NEUTRAL (42%) IN THEIR VIEWS ABOUT EDUCATION AGENTS.

THREE QUARTERS OF STUDENTS WHO HAD AT LEAST SOME KNOWLEDGE OF EDUCATION AGENTS WOULD PREFER TO USE ONE THAT HAD BEEN ASSESSED AND DEEMED LEGITIMATE BY AN INDEPENDENT BODY (75%).

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Predictions of the disruption to the flow of international students during the COVID-19 pandemic have proven patchy since it began. In the UK, expectations of a large reduction in student enrolments in the 2020/21 year proved unfounded, and international student flows across the globe are perhaps more accurately considered to have changed rather than stalled or stuttered. Despite this, the disruption to the international student community caused by the COVID-19 pandemic remains clear: 6 in 10 students noted that their plans had been disrupted (61%). This broke down to 39% of all students having delayed their plans, 13% having changed them (to a different country, course or university) and 9% having cancelled them. These figures chime with previous research with student audiences conducted by THE, which found similar disruption levels in October 2020 (disrupted: 61%, delayed 37%, changed: 16%, cancelled: 8%).

Among students who had changed their plans, half had decided to apply to a different country (52%), while around a quarter had decided to apply to a different university within the same country as originally intended (27%) or had decided to apply to a different course (23%).

The fact that around four in ten international students have delayed their study application clearly represents an opportunity for universities in the not-too-distant future. As much of the world begins to find its footing and to think about the potential financial, cultural and social opportunities offered by a “post-COVID” world in 2021, 2022 and onwards, it will be imperative for international higher education to step up to the challenge of catering to the needs of this cohort of deferred students alongside the usual student flow. In a world so shaken by a pandemic, any such opportunity for recovery should be grasped by institutions wherever possible. It is consequently necessary for careful consideration of how best to attract students to ensure good outcomes for institutions, students and society.
While the majority of the world has had to quickly adapt to the realities of home and online working, our findings demonstrate considerable hesitancy among the global student population in terms of moving their higher education experience online.

Just four in ten students stated that they would see online learning with an international university as a worthwhile experience (42%), albeit a similar proportion feel that it would be (38%). The relatively low levels of appetite for online learning was perhaps most clearly demonstrated by prospective international student agreement about whether online learning with an international university would be preferable to studying face to face in their home countries; just under 3 in 10 students agreed that it would be preferable (28%) and over half disagreed (51%).

When asked about their top three concerns about the pandemic affecting the ability to study abroad, nearly half of students stated that financial concerns caused by the COVID-19 pandemic were a concern for them (48%). This was more common among students from Africa (55%) than in Europe (37%) and Oceania (35%).

Students demonstrated that widespread concern about the pandemic remains: just 1% of students stated that none of the factors were a concern to them. Other factors that were commonly noted as a concern by students included difficulties related to traveling to their destination (39%), difficulties gaining a work placement or internship (32%), the fact that teaching may be delivered online (31%) and concerns around participation in extracurricular activities (31%).

Learning from home may well have become something of a new normal for many students, but reservations remain: allaying these fears by improving the offering, offering an in-person alternative where possible and safe or just by reassuring students of the quality of online learning may be necessary as international higher education moves forwards.

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Another aspect of international student recruitment that is much discussed by the sector is the role of education agents. Recent research published by the British Universities’ International Liaison Association (BUILA) estimated that around half of all international students starting their studies in the UK in 2018/19 utilised the help of an education agent.

Despite the prevalence of education agents in international recruitment, concerns have been raised about how students are able to assess the agents that offer their services to them and decide which are trustworthy and offer a good service. Given that our research showed that one in five students that had heard of agents had already used one (22%), one in eight planned to do so (13%) and a third felt that they may do in future (32%), it is clear that agents are indeed important to the international student community. This combines to two thirds of prospective international students having used agents or feeling that they potentially will in future (67%).

Our research demonstrated that knowledge about the role of agents among prospective international students was limited: while nearly two thirds of students had heard of agents (64%), just one in eight felt that they had a good level of knowledge about them (13%). Given the proportion of international students that will engage agents, it is perhaps a concern how many do not feel they have a good depth of knowledge about them. Even among students that felt they may use agents in future, 45% felt that they had ‘limited’ knowledge about them, and just 22% felt they had a good level of knowledge.

In terms of their views about education agents, it was rare for students to feel negative about them (9% of students aware of education agents), although a large proportion demonstrated neutrality or a lack of opinion about them (42%). Despite this, 45% felt generally positive towards agents, a much larger proportion than those expressing negative views towards them.

Clearly, education agents are here to stay. Helping to ensure that students are able to make the right choices in terms of who to engage is both a challenge and an opportunity for the industry moving forwards.

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ARE STUDENTS ABLE TO MAKE INFORMED CHOICES ABOUT EDUCATION AGENTS?

It is important that students are well informed and empowered to make the right study decisions for them. Even among students who said they had at least some knowledge about education agents, just 44% stated that they would know how to find out which agents have good reputations. This leaves 56% of prospective students who did not know much about agents or would not be able to find out those that had a good reputation.

Space exists in the sector for a more widely known and trusted body to provide students with information about which agents exist and to inform student choice about which agent to engage. Students on the whole agreed that they would prefer to use an education agent that had been assessed and deemed legitimate by an independent body (75%). There is also a clear perception among a large proportion of prospective students that agents may be biased towards certain universities (57% of students with at least some knowledge about education agents) and that they are primarily interested in making money for themselves (52%).

None of this is to say that students do not appreciate the role that agents play. Four in five agreed that agents help prospective students through difficult processes such as visa applications (78%). Half of students agreed that agents want to ensure that students choose to study at the right university for their needs (53%) and that they represent the interests of students (49%).

Education agents offer a valuable service to the sector. Students may be helped to make better choices, and have better opinions of agents and their role, if they were more confident in their neutrality and were able to assess agents more easily ahead of engaging them. A more transparent agent market with more information available about it would ultimately help students, institutions and agents themselves as the sector takes its cautious steps towards a post-covid world.

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WHERE DO PROSPECTIVE STUDENTS LOOK FOR INFORMATION?

Students being able to make informed study choices remains a key challenge for the sector. Making the decision about where to study functions as a crucial moment in many young peoples’ lives, and prospective students consult a diverse range of sources to research potential institutions.

Despite this, just four in ten students agreed that there is one source of information for prospective students that collates useful information in one place (40%), and just over half find it difficult to process all of the information available to decide where and what to study (53%). That said, a small majority of students feel that the current sources of information for prospective students are convenient to use (61%). It may be unrealistic, or even undesirable, to expect students to ever consult one source to make such decisions, but student appetite for more support clearly exists.

This idea that some students struggle to make decisions about where to study is supported by the fact that around half of prospective students have found it difficult to find information about some universities and courses (49%). Around a third of students also agreed that they have found it difficult to trust some of the information that they have found (35%), that the amount of information that they have found has been overwhelming (35%) and that they have found conflicting information about some courses or universities and have not known how to know which is correct (30%). Students are faced with a wealth of information but can still find it difficult to feel like they are making informed decisions.

As the pandemic hopefully recedes and the ever-growing international student marketplace settles into some form of greater normality, it will be important for the higher education sector to ensure that it caters to the needs of prospective students. In much the way that the important role played by agents could be codified and crystallised to ensure that it is as optimised as possible, the excellent work done by many bodies to help inform student choice could still be improved. With a multitude of information available to students, if a body were able to condense information, verify the validity of operators in the sector and signpost to trusted external sources it would be doing a valuable service in informing prospective students when they make life-changing decisions.

OVERALL AGREEMENT (%)

TO WHAT EXTENT DO YOU AGREE OR DISAGREE THAT…?

The current sources of information for prospective students are convenient to use

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<thead>
<tr>
<th>Strongly Agree</th>
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<th>Neither Agree nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
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<tr>
<td>11%</td>
<td>23%</td>
<td>34%</td>
<td>11%</td>
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I find it difficult to process all of the information available to decide where and what to study

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WHEN MAKING DECISIONS ABOUT WHERE TO STUDY, WHICH, IF ANY, OF THE FOLLOWING ISSUES HAVE YOU FACED?

I have found it difficult to find information about some courses/universities

49%

I have found it difficult to trust some of the information that I have found

35%

I have found the amount of information available overwhelming

35%

I have found conflicting information about some courses/universities and have not known how to know which is correct

30%

I have been unable to find up to date information

23%

I have not been able to locate information that I consider to be impartial / non-biased

21%

I have found it difficult to find some information in a language that I can understand

11%

None of the above

11%
THE STUDENT PULSE

Student Pulse: Unparalleled access to the international student community

THE Student Pulse represents an unrivalled research panel made up of students and prospective students from across the globe. Our panel provides unique access to a truly international research resource.

To learn more about our panel, or to discuss your bespoke research requirements, please contact the team on consultancy@timeshighereducation.com

Panel services tailored to your needs

The panel is managed by our experienced consultancy team, who offer bespoke services based upon the research needs of our clients. The consultancy team are experts in the field of Higher Education and student-focused research, and their guidance, support and expertise are harnessed in all THE Student Pulse services.

A global perspective

Our fast-expanding panel draws upon the experiences of students from every corner of the globe and from every level of the higher education experience. From Iceland to Tuvalu, and from current high school students to postgraduates, the composition of our panel means that we can cater to every requirement.

THE CONSULTANCY

THE Consultancy provides strategic, data-driven guidance to universities, governments and organisations working with the higher education sector globally. Building on our vast sector expertise and long history, we support our partners to build effective and sustainable strategies aligned to their unique mission.

Understanding that all organisations are unique, we combine proprietary and primary data to design customised solutions. Our consultancy practice harnesses THE’s strong network in the sector, combining engagement of global stakeholders within our analyses.

In 2021 we have also developed THE Student Pulse, the uniquely global panel of international students. We will draw on our vast experience in quantitative and qualitative research methods to generate unique insights into the worldwide student community.

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Lim Mei Mei,
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Sam Whittaker,
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METHODOLOGY

- Online survey of 3,039 prospective students.
- Drawn from the THE Student Pulse panel, which is composed of users of the THE Student website or attendees at THE Student events.
- Survey of individuals from 150 different countries applying to 91 different countries around the world.
- Fieldwork conducted between 26th April and 4th May 2021.
- Survey administered, conducted and analysed by the THE Consultancy team.

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